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Trey services institutional clients by providing counsel and guidance on portfolio design, asset allocation, manager selection, investment policy statements, and performance monitoring. Prior to joining the firm, Trey was a consultant at ORION Investment Advisors and held positions at BNY Mellon, PIMCO, and Legg Mason. Trey earned a BS in Finance from the Moore School of Business at the University of South Carolina. He obtained the Certified Investment Management Analyst (CIMA®) from Investments & Wealth Institute (formerly IMCA) accreditation program at the Wharton School of Business. In his free time, Trey enjoys traveling, golfing, and volunteering with local charitable organizations.